Assigning CASE MANAGERS to Students with IEPs

LOCATING STUDENTS WITH SERVICES AT SCHOOLS
☐ Lead Teacher or Administrator accesses EDplan.
☐ Click “STUDENTS”.
☐ Choose your school from “SCHOOL” drop down.
☐ Click the checkbox “STATUS” to indicate “SPECIAL EDUCATION” and “ELIGIBILITY”.
☐ Click “View Students”
☐ Then click “EXPORT SEARCH RESULTS”
☐ Open the file (sometimes a warning about formatting comes up – click “ok”)
☐ Work on sorting out the caseloads using the Excel Spreadsheet.

ASSIGNING CASE MANAGERS
☐ Using the Excel Spreadsheet you just created, go back to EDplan.
☐ Click “WIZARDS”
☐ Click “CASELOAD ADMINISTRATION WIZARD”
☐ Find a case manager whose caseload you intend to work on using the query option.
☐ Click “VIEW USER”
☐ Click the name of the staff.
☐ Choose “ADD MORE STUDENTS TO THE CASELOAD”
☐ Find the students either individually or by your school using the query function.
☐ Click “VIEW STUDENTS”
☐ Click the checkbox to the left under “CASE MANAGER” to add the student to the caseload.
☐ Scroll to the bottom of the page and Click “ADD STUDENT TO THE CASELOAD” or “ADD STUDENT TO CASELOAD, THEN FIND ANOTHER” to add more students.
☐ Repeat as necessary for each case manager to construct their caseload.

REMOVE STUDENT FROM CASELOAD
☐ Click “WIZARDS”
☐ Click “CASELOAD ADMINISTRATION WIZARD”
☐ Find a case manager whose caseload you intend to work on using the query option.
☐ Click “VIEW USER”
☐ Click the name of the staff.
☐ Uncheck the box on the left of student names under “Case Manager”
☐ Scroll to bottom of page and click “UPDATE THE DATABASE”

CONFIRM CASELOADS
☐ Click “STUDENTS”.
☐ Choose your school from “SCHOOL” drop down.
☐ Click the checkbox “STATUS” to indicate “SPECIAL EDUCATION” and “ELIGIBILITY”.
☐ Click “View Students”